

My Learning Essentials

INTRODUCTION TO ENDNOTE X8



***Should you require this workbook in a digital format please contact us at
uml.teachingandlearning@manchester.ac.uk***

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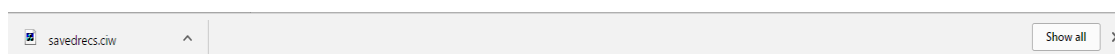
1. Opening a new library on a University cluster PC

- Click on the Microsoft icon in the bottom left hand corner – go to program files and scroll down to find the Endnote folder. Open the folder and double click on the Endnote program.
- Click on '**File>New.**' In EndNote menu
- Give the library a name and save it to My Documents (on your P Drive)
- Open the **Internet Explorer/Chrome** browser for the rest of the session.

2. Direct export of references into EndNote using Web of Science and Proquest

Direct export from Web of Science

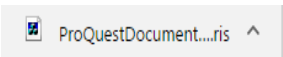
- Go to the Library homepage - www.manchester.ac.uk/library
- Choose the 'Search Resources' Tab
- Select 'Databases A to Z', then find *Web of Science* under 'W' and choose on-campus access when prompted
- Click on the orange *Web of science* button in the centre of the screen
- Click on the *All Databases* tab at the top of the screen and select 'Web of Science™ Core Collection'
- Run a keyword search on a topic
- Mark a few records to save and click on **Save to** tab (Save to EndNote Online is default) and choose **EndNote Desktop.**
- Select what level of detail you want to export (Author, Title, Source, Abstract etc...)
- Your selected references should automatically download into Endnote.
- If they do not then download the file to the desktop, it can appear in the bottom left hand corner. Click on it to open it in Endnote.



Choose destination Export to: EndNote



Note: the records will be automatically added to your All References folder and will also be listed in the Imported References folder.

Direct export from Proquest:

- Go to the Library homepage - www.manchester.ac.uk/library
- Choose the 'Search Resources' Tab
- Select Databases > A to Z
- Find the link to Proquest and open the database
- Run a keyword search on a topic
- Select a few records to export
- Click 'Save'
- Choose the option for 'RIS (works with EndNote, Citavi, etc.)'
- To complete the export:
- Save to desktop
- Click on the file 
- Choose destination Export to: EndNote

3. Direct export from Google Scholar


Before you carry out a search you need to change the Google Scholar settings by following these instructions.

- Click on the  icon on the left hand side.
- Choose the  **Settings** option.
- Scroll down to the **Bibliography Manager** options
- Click on **Show links to import citations into** and change the drop-down option to '**EndNote**'
- Click **Save**

When you return to your Google Scholar and carry out a search you will see the **Import into EndNote** link under each result.

Click on the **Import into EndNote** save to the desktop and click on the downloaded file as in previous examples.

4. Manually adding a record to your EndNote library

- In your EndNote library, click the **New Reference** icon  or select **References > New Reference**
- Select 'Journal Article' from the dropdown menu options and enter the details of the following article:

Author: Hookway, N

Jones, R

Year: 2008

Title: 'Entering the blogosphere': some strategies for using blogs in social research.

Journal: Qualitative Research

Volume: 8

Issue: 1

Pages: 91-113

To save the record, **click** the grey 'x'  at the top right of the screen to close the reference window.

Note: if there are multiple authors, you should add each one on a separate line as above. Institutional authors such as government departments, NGOs and companies should be entered with a comma at the end of their name e.g. **Department of Work and Pensions,**


5. Removing duplicates

Finding and removing duplicate references.

- From the EndNote toolbar, select **References**
- Select **Find Duplicates**
- View duplicate references in the comparison panel
- Select Keep This Record to retain the version of the reference you want to save.

6. Linking a PDF to an EndNote record

EndNote X8 has a function which enables it to search for the PDFs' of full-text articles and attach them to your references automatically.


- Highlight the references you want to find [Ctrl+A] to select all the records in your library and click the '**Find Full Text...**'  icon.
- You will then be required to login with your University credentials

EndNote will search the internet for full-text versions of the selected references and if these are available and accessible will add them to your library.

- Available PDFs' will show up in the Found PDF list.
- If a PDF is available on the internet but cannot be downloaded automatically, EndNote will display an entry in the Found URL list.
- Where EndNote cannot locate a PDF it will display the reference in the Not Found list.


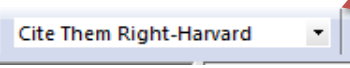
NOTE: the number of available PDFs retrieved can vary due to copyright restrictions.

You can also link PDFs' you have downloaded yourself to the corresponding record in EndNote:

- Select an EndNote record, right click on the record and scroll down to the **File Attachments** field
- Right-click in this field and choose **File Attachments... > Attach file...** then locate the PDF article or click on the paperclip icon  (far right)
- Click **Open** to link the file to its EndNote record and **save** the changes by selecting a different record and following the prompt.

7. Creating a stand along bibliography in Word

In EndNote, you can select the bibliographic style you want to use from the drop-down options. You can preview the references as they will display at the bottom of the window.

- Choose   drop down menu to see the full list of referencing styles.
- Select several records by holding down the [Ctrl] key and highlighting them or [Ctrl+A] to select all the records in your library
- In EndNote, Select **Edit > Copy Formatted**
- In Word, open a new window for your bibliography and select **Paste** from the home menu.

This will copy the records into Word in the chosen style as a plain text file.

Tip: To save time sort the records alphabetically by author before you edit and paste.

8. Inserting citations and references into Word using EndNote's 'Cite While You Write' function.

In Word, type the following lines of text into a new document:

EndNote can make writing up your research and creating bibliographies much easier. You can add citations as you write and automatically insert the references into your document. There are thousands of different bibliographic styles available including Vancouver, Harvard, MLA and Nature.

Alternatively just type **=rand(3)** and press **return** this will auto-generate three paragraphs of text

- Place the cursor at the end of the first paragraph
- In EndNote, select a reference and go to **Tools – Cite While You Write (CWYW) - Insert Selected Citation(s)**.
- Highlight the reference(s) you want and click on **Insert**
- Repeat the process for the second and third paragraphs

EndNote will insert the citations and also create a full reference at the bottom of your document.



Alternatively, you can go to Word via the EndNote X8 tab - **Insert Citation**. A searchbox will appear where you can type anything that appears in your reference e.g. author name, title etc. Select the reference and then **Insert** from the searchbox.

9. Formatting references in Word

To change the bibliographical style of your references:


- In Endnote go to **Tools – Cite While You Write [CWYW] – Format bibliography.**
- Use the **With Output Style** drop down menu to select your style e.g. Author-Date.
- If your style isn't in the default menu click **Browse** for the full list of referencing styles and choose the appropriate one e.g. Harvard.

Tip: you can jump to the option you want e.g. Vancouver by starting to type the name.

10. Editing citations

You can modify the appearance of in-text citations (e.g. exclude Author or Year or add page numbers) using the  **Edit & Manage Citation(s)** command in the EndNote X8 tab.

To add page references to a citation, highlight the citation you want to edit and click

 **Edit & Manage Citation(s)**



- In the **Suffix** field, enter the text as you would like it to appear e.g. p.29-36
- Click **OK** to insert the suffix information into the citation

To remove the author or year from an in-text citation where you have already referred to it directly in your text e.g. "as Goldacre argues (2008)..."

- Highlight the citation in Word and select  **Edit & Manage Citation(s)**
- Select **Exclude Author** or **Exclude Year** in the drop down menu as required.

11. Inserting Footnotes

You can insert footnotes using Microsoft Word in conjunction with EndNote.

- Place the cursor where you want your footnote to appear
- Select the references tab in Word and select the **Insert Footnote**  tab
- This will number your footnote and open the footnote field at the bottom of the page
- Now select the 'EndNote X8' tab in Word and select the **Insert Citation**  tab
- Select the citation you want and it will appear at the bottom of the page

12. Creating Groups

- You can manage your reference collection in EndNote by creating groups for specific topics, authors or journals.
- In the EndNote toolbar select **Groups – Create Group**
- Give your new group a name and it will appear in the left hand menu under the Groups heading.
- To add references to a group you can drag and drop one across or select a group of references and drag them all across in one go. {Nulty, 1990 #21}

You can create a Smart Group with specific searching criteria which will update groups as existing references are edited and new references are added to the library which match your criteria.

- In the EndNote toolbar select **Groups – Create Smart Group**
- Give your new group a name and then fill in the appropriate criteria for your search e.g. it could be a key author, specific journal, keywords etc
- Each time you add a new references to your EndNote Library those references that correspond to your Smart Group criteria will be added to your Smart Group.

13. EndNote online

Step 1: Signing up to Endnote online

Access the **Web of Science** database and sign up for an Endnote online account with your University of Manchester email address.

www.manchester.ac.uk/library/searchresources/databases/

NOTE: By using your University of Manchester email address you gain more storage space for your references and access to more bibliographic styles.

Step 2: Exporting from Library Search to Endnote online

Go to the Library homepage – www.manchester.ac.uk/library

- Type a keyword in the Library Search box on the left hand side and click Search.
- Click on the title of an article from your list of results
- On the right hand side access the **Send to** menu and select **EndNote Web**
- If you are logged into Endnote Web then the reference from Library Search should be automatically added to your reference library.

Tip 1: Using import filters in EndNote online

Each database needs a different import filter to download references into EndNote online.

If you are going to use EndNote online on a regular basis with different databases and you are not sure how to export the references from the database then just carry out a quick Google search to find the import instructions.

e.g. "PubMed and Endnote online import instructions".

Tip 2: Inserting citations from EndNote online into Word

In Word access the EndNote tab – go to Preferences and then the Application tab. Change the Application setting from EndNote to EndNote Web.

Logon to your EndNote online account and you will then be able to insert citations saved in your EndNote online account into your Word document.

Tip 3: Creating a bibliography using EndNote online

In EndNote online click the **Format** tab at the top of the screen.

In the References drop down menu select a group or All references in my library. Select desired output style from the Bibliographic style: drop-down menu e.g. Harvard.

NOTE: If your output style is not listed then click **Select Favorites** and add the style to My Favorites. Select desired file format from the File format: drop-down menu.

- RTF (rich text file) is the appropriate file format for Word documents.
- Click Save, Email or Preview and Print as desired and follow on-screen directions.

Tip 4: Transferring references between EndNote desktop and EndNote online

1. Transferring references using EndNote desktop

- In EndNote, select Tools > Sync
- Log in at the prompt using your EndNote online email address and password
- Follow the onscreen instructions.

2. Transferring references from EndNote online

- In EndNote online, select the Format tab and choose Export References
- Select the group (folder) of references to export
- Choose Export Style: EndNote Export
- Click Save and save the file as a .txt file
- In EndNote desktop, select File > Import > File... and select the .txt file you have downloaded
- Choose Import Option: EndNote Import
- Click Import to add the references to your EndNote desktop library

Further information

Referencing guide at the University of Manchester:

<http://subjects.library.manchester.ac.uk/referencing>

From the EndNote Web homepage click on the **"Training"** tab for detailed help.

<http://endnote.com/product-details/basic>

YouTube EndNote online overview

<https://youtu.be/FqvYH0FUXps>

NOTES:

CONTACTS

If you have any queries about this booklet or the services mentioned in it, please contact the University of Manchester Library Teaching and Learning Team.

Email: uml.teachingandlearning@manchester.ac.uk
